

LEARNING MADE EASY



Project Management

ALL-IN-ONE

for
dummies[®]
A Wiley Brand



Stanley E. Portny, PMP,
et al.



Project Management

ALL-IN-ONE

**by Nick Graham; Mark C. Layton,
MBA², CST, PMP, SAFe SPC; David Morrow,
CSP, ICP-ACC; Steven J. Ostermiller, CSP,
PMP; Stanley E. Portny, PMP; Doug Rose,
CSP-SM, PMI-ACP, PMP, SAFe SPC;
and Cynthia Snyder Dionisio**

**for
dummies[®]**
A Wiley Brand

Project Management All-in-One For Dummies®

Published by: **John Wiley & Sons, Inc.**, 111 River Street, Hoboken, NJ 07030-5774, www.wiley.com

Copyright © 2020 by John Wiley & Sons, Inc., Hoboken, New Jersey

Published simultaneously in Canada

No part of this publication may be reproduced, stored in a retrieval system or transmitted in any form or by any means, electronic, mechanical, photocopying, recording, scanning or otherwise, except as permitted under Sections 107 or 108 of the 1976 United States Copyright Act, without the prior written permission of the Publisher. Requests to the Publisher for permission should be addressed to the Permissions Department, John Wiley & Sons, Inc., 111 River Street, Hoboken, NJ 07030, (201) 748-6011, fax (201) 748-6008, or online at <http://www.wiley.com/go/permissions>.

Trademarks: Wiley, For Dummies, the Dummies Man logo, Dummies.com, Making Everything Easier, and related trade dress are trademarks or registered trademarks of John Wiley & Sons, Inc., and may not be used without written permission. All other trademarks are the property of their respective owners. John Wiley & Sons, Inc., is not associated with any product or vendor mentioned in this book.

LIMIT OF LIABILITY/DISCLAIMER OF WARRANTY: WHILE THE PUBLISHER AND AUTHOR HAVE USED THEIR BEST EFFORTS IN PREPARING THIS BOOK, THEY MAKE NO REPRESENTATIONS OR WARRANTIES WITH RESPECT TO THE ACCURACY OR COMPLETENESS OF THE CONTENTS OF THIS BOOK AND SPECIFICALLY DISCLAIM ANY IMPLIED WARRANTIES OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE. NO WARRANTY MAY BE CREATED OR EXTENDED BY SALES REPRESENTATIVES OR WRITTEN SALES MATERIALS. THE ADVICE AND STRATEGIES CONTAINED HEREIN MAY NOT BE SUITABLE FOR YOUR SITUATION. YOU SHOULD CONSULT WITH A PROFESSIONAL WHERE APPROPRIATE. NEITHER THE PUBLISHER NOR THE AUTHOR SHALL BE LIABLE FOR DAMAGES ARISING HEREFROM.

For general information on our other products and services, please contact our Customer Care Department within the U.S. at 877-762-2974, outside the U.S. at 317-572-3993, or fax 317-572-4002. For technical support, please visit <https://hub.wiley.com/community/support/dummies>.

Wiley publishes in a variety of print and electronic formats and by print-on-demand. Some material included with standard print versions of this book may not be included in e-books or in print-on-demand. If this book refers to media such as a CD or DVD that is not included in the version you purchased, you may download this material at <http://booksupport.wiley.com>. For more information about Wiley products, visit www.wiley.com.

Library of Congress Control Number: 2020937968

ISBN 978-1-119-70026-5 (pbk); ISBN 978-1-119-70027-2 (ebk); ISBN 978-1-119-70028-9 (ebk)

Manufactured in the United States of America

10 9 8 7 6 5 4 3 2 1

Contents at a Glance

Introduction	1
Book 1: In the Beginning: Project Management Basics	5
CHAPTER 1: Achieving Results with Project Management	7
CHAPTER 2: Involving the Right People	23
CHAPTER 3: Developing Your Game Plan	43
Book 2: Steering the Ship: Planning and Managing a Project	71
CHAPTER 1: You Want This Project Done When?	73
CHAPTER 2: Starting Your Project Team Off on the Right Foot	111
CHAPTER 3: Monitoring Progress and Maintaining Control	129
CHAPTER 4: Bringing Your Project to Closure	155
Book 3: Helping Out: Using Tools on a Project	167
CHAPTER 1: Considering Checklists and Templates	169
CHAPTER 2: The Key Documents for Managing a Project	179
CHAPTER 3: Working with Microsoft Project 2019	185
CHAPTER 4: Surveying Cool Shortcuts in Project 2019	197
Book 4: A New Method: Agile Project Management	203
CHAPTER 1: Applying the Agile Manifesto and Principles	205
CHAPTER 2: Defining the Product Vision and Product Roadmap	233
CHAPTER 3: Planning Releases and Sprints	253
CHAPTER 4: Working throughout the Day	285
CHAPTER 5: Showcasing Work, Inspecting, and Adapting	309
Book 5: A Popular Agile Approach: Running a Scrum Project	321
CHAPTER 1: The First Steps of Scrum	323
CHAPTER 2: Planning Your Project	339
CHAPTER 3: The Talent and the Timing	359
CHAPTER 4: Release and Sprint Planning	377
CHAPTER 5: Getting the Most Out of Sprints	399
CHAPTER 6: Inspect and Adapt: How to Correct Your Course	417

Book 6: The Next Level: Enterprise Agility	425
CHAPTER 1: Taking It All In: The Big Picture	427
CHAPTER 2: Sizing Up Your Organization	443
CHAPTER 3: Driving Organizational Change	463
CHAPTER 4: Putting It All Together: Taking Steps toward an Agile Enterprise	485
Book 7: Making It Official: PMP Certification	503
CHAPTER 1: Introducing the PMP Exam	505
CHAPTER 2: It's All about the Process	519
CHAPTER 3: Reviewing the PMI Code of Ethics and Professional Conduct	541
Index	553

Table of Contents

INTRODUCTION	1
About This Book	1
Foolish Assumptions	2
Icons Used in This Book	2
Beyond the Book	3
Where to Go from Here	3
BOOK 1: IN THE BEGINNING: PROJECT MANAGEMENT BASICS	5
CHAPTER 1: Achieving Results with Project Management	7
Determining What Makes a Project a Project	7
Understanding the three main components that define a project	8
Recognizing the diversity of projects	10
Describing the four phases of a project life cycle	10
Defining Project Management	12
Starting with the initiating processes	13
Outlining the planning processes	14
Examining the executing processes	15
Surveying the monitoring and controlling processes	16
Ending with the closing processes	17
Knowing the Project Manager's Role	17
Looking at the project manager's tasks	18
Staving off excuses for not following a structured project-management approach	18
Avoiding shortcuts	19
Staying aware of other potential challenges	20
CHAPTER 2: Involving the Right People	23
Understanding Your Project's Stakeholders	24
Developing a Stakeholder Register	24
Starting your stakeholder register	25
Ensuring your stakeholder register is complete and up to date	28
Using a stakeholder register template	30
Determining Whether Stakeholders Are Drivers, Supporters, or Observers	31
Distinguishing the different groups	32
Deciding when to involve your stakeholders	33
Using different methods to involve your stakeholders	36
Making the most of your stakeholders' involvement	37

	Displaying Your Stakeholder Register	38
	Confirming Your Stakeholders' Authority	39
	Assessing Your Stakeholders' Power and Interest	40
CHAPTER 3:	Developing Your Game Plan	43
	Divide and Conquer: Breaking Your Project into Manageable Chunks	43
	Thinking in detail	44
	Identifying necessary project work with a work breakdown structure	45
	Dealing with special situations	53
	Creating and Displaying Your Work Breakdown Structure	57
	Considering different schemes to create your WBS hierarchy	57
	Using one of two approaches to develop your WBS	58
	Categorizing your project's work	60
	Labeling your WBS entries	61
	Displaying your WBS in different formats	62
	Improving the quality of your WBS	66
	Using templates	66
	Identifying Risks While Detailing Your Work	68
	Documenting What You Need to Know about Your Planned Project Work	70

BOOK 2: STEERING THE SHIP: PLANNING AND MANAGING A PROJECT 71

CHAPTER 1:	You Want This Project Done When?	73
	Picture This: Illustrating a Work Plan with a Network Diagram	74
	Defining a network diagram's elements	74
	Drawing a network diagram	76
	Analyzing a Network Diagram	77
	Reading a network diagram	77
	Interpreting a network diagram	79
	Working with Your Project's Network Diagram	84
	Determining precedence	84
	Using a network diagram to analyze a simple example	87
	Developing Your Project's Schedule	92
	Taking the first steps	92
	Avoiding the pitfall of backing in to your schedule	93
	Meeting an established time constraint	94
	Applying different strategies to arrive at your destination in less time	95
	Estimating Activity Duration	102
	Determining the underlying factors	103
	Considering resource characteristics	103

	Finding sources of supporting information	104
	Improving activity duration estimates	104
	Displaying Your Project's Schedule	106
CHAPTER 2:	Starting Your Project Team Off on the Right Foot	111
	Finalizing Your Project's Participants	112
	Are you in? Confirming your team members' participation	112
	Assuring that others are on board	114
	Filling in the blanks	115
	Developing Your Team	116
	Reviewing the approved project plan	117
	Developing team and individual goals	118
	Specifying team-member roles	118
	Defining your team's operating processes	119
	Supporting the development of team-member relationships	120
	Resolving conflicts	120
	All together now: Helping your team become a smooth-functioning unit	123
	Laying the Groundwork for Controlling Your Project	125
	Selecting and preparing your tracking systems	125
	Establishing schedules for reports and meetings	126
	Setting your project's baseline	127
	Hear Ye, Hear Ye! Announcing Your Project	127
	Setting the Stage for Your Post-Project Evaluation	128
CHAPTER 3:	Monitoring Progress and Maintaining Control	129
	Holding the Reins: Project Control	130
	Establishing Project Management Information Systems	131
	The clock's ticking: Monitoring schedule performance	132
	All in a day's work: Monitoring work effort	138
	Follow the money: Monitoring expenditures	143
	Putting Your Control Process into Action	147
	Heading off problems before they occur	147
	Formalizing your control process	148
	Identifying possible causes of delays and variances	149
	Identifying possible corrective actions	150
	Getting back on track: Rebaselining	151
	Reacting Responsibly When Changes Are Requested	151
	Responding to change requests	152
	Creeping away from scope creep	153

CHAPTER 4: Bringing Your Project to Closure	155
Staying the Course to Completion	156
Planning ahead for your project’s closure	156
Updating your initial closure plans when you’re ready to wind down the project	157
Charging up your team for the sprint to the finish line	158
Handling Administrative Issues.....	158
Providing a Smooth Transition for Team Members.....	159
Surveying the Results: The Post-Project Evaluation	160
Preparing for the evaluation throughout the project	161
Setting the stage for the evaluation meeting	162
Conducting the evaluation meeting	163
Following up on the evaluation	165
 BOOK 3: HELPING OUT: USING TOOLS ON A PROJECT ...	167
 CHAPTER 1: Considering Checklists and Templates	169
Using Checklists Properly.....	170
Understanding Checklist Types.....	171
Trying Templates	172
Reviewing Project Structure.....	173
Kicking off the project.....	173
Doing the planning	175
Delivering project products	175
Closing the project.....	176
Evaluating the project.....	176
 CHAPTER 2: The Key Documents for Managing a Project	179
Kicking Off.....	180
Project Planning.....	180
The major planning documents	180
The logs.....	181
Control checklists	182
Controlling a Project.....	183
Thinking About What You Need	184
 CHAPTER 3: Working with Microsoft Project 2019	185
Connecting Project 2019 to Project Management	186
Defining “project manager”	187
Identifying what a project manager does	187
Introducing Project 2019	188
Getting to Know You.....	189
Opening Project 2019.....	189
Navigating Ribbon tabs and the Ribbon	191
Displaying more tools.....	194
An Updated Feature: Tell Me What You Want to Do	196

CHAPTER 4: Surveying Cool Shortcuts in Project 2019	197
Task Information	197
Resource Information	198
Frequently Used Functions	199
Subtasks	200
Quick Selections	200
Fill Down	200
Navigation	200
Hours to Years	201
Timeline Shortcuts	201
Quick Undo and Repeat	202

BOOK 4: A NEW METHOD: AGILE PROJECT MANAGEMENT 203

CHAPTER 1: Applying the Agile Manifesto and Principles	205
Understanding the Agile Manifesto	205
Outlining the Four Values of the Agile Manifesto	208
Value 1: Individuals and interactions over processes and tools	209
Value 2: Working software over comprehensive documentation	210
Value 3: Customer collaboration over contract negotiation	212
Value 4: Responding to change over following a plan	213
Defining the 12 Agile Principles	214
Agile principles of customer satisfaction	216
Agile principles of quality	218
Agile principles of teamwork	220
Agile principles of product development	222
Adding the Platinum Principles	226
Resisting formality	226
Thinking and acting as a team	227
Visualizing rather than writing	228
Seeing Changes as a Result of Agile Values	229
Taking the Agile Litmus Test	230
 CHAPTER 2: Defining the Product Vision and Product Roadmap	 233
Agile Planning	234
Progressive elaboration	236
Inspect and adapt	237
Defining the Product Vision	237
Step 1: Developing the product objective	239
Step 2: Creating a draft vision statement	239
Step 3: Validating and revising the vision statement	241
Step 4: Finalizing the vision statement	242

Creating a Product Roadmap	243
Step 1: Identifying product stakeholders	244
Step 2: Establishing product requirements	245
Step 3: Arranging product features	245
Step 4: Estimating efforts and ordering requirements	247
Step 5: Determining high-level time frames	250
Saving your work	250
Completing the Product Backlog	251
CHAPTER 3: Planning Releases and Sprints	253
Refining Requirements and Estimates	253
What is a user story?	254
Steps to create a user story	256
Breaking down requirements	260
Estimation poker	262
Affinity estimating	265
Release Planning	267
Preparing for Release	271
Preparing the product for deployment	271
Prepare for operational support	272
Preparing the organization	273
Preparing the marketplace	274
Sprint Planning	275
The sprint backlog	276
The sprint planning meeting	277
CHAPTER 4: Working throughout the Day	285
Planning Your Day: The Daily Scrum	285
Covering important topics	286
Ensuring an effective meeting	287
Tracking Progress	289
The sprint backlog	289
The task board	292
Understanding Agile Roles in the Sprint	294
Keys for daily product owner success	295
Keys for daily development team member success	296
Keys for daily scrum master success	297
Keys for daily stakeholder success	298
Keys for daily agile mentor success	298
Creating Shippable Functionality	299
Elaborating	300
Developing	300
Verifying	301
Identifying roadblocks	304

	Implementing Information Radiators.....	305
	Wrapping Up at the End of the Day	307
CHAPTER 5:	Showcasing Work, Inspecting, and Adapting.....	309
	The Sprint Review	309
	Preparing to demonstrate	310
	The sprint review meeting	311
	Collecting feedback in the sprint review meeting.....	314
	The Sprint Retrospective	315
	Planning for retrospectives	317
	The retrospective meeting.....	317
	Inspecting and adapting.....	319
	BOOK 5: A POPULAR AGILE APPROACH: RUNNING A SCRUM PROJECT	321
CHAPTER 1:	The First Steps of Scrum.....	323
	Getting Your Scrum On.....	323
	Show me the money.....	324
	I want it now.....	325
	I'm not sure what I want.....	326
	Is that bug a problem?	327
	Your company's culture	327
	The Power in the Product Owner	327
	Why Product Owners Love Scrum	329
	The Company Goal and Strategy: Stage 1	331
	Structuring your vision	332
	Finding the crosshair.....	333
	The Scrum Master	333
	Scrum master traits.....	334
	Scrum master as servant leader	335
	Why scrum masters love scrum	335
	Common Roles Outside Scrum	336
	Stakeholders.....	336
	Scrum mentors	337
CHAPTER 2:	Planning Your Project.....	339
	The Product Roadmap: Stage 2.....	339
	Take the long view.....	340
	Use simple tools	341
	Create your product roadmap.....	342
	Set your time frame	343
	Breaking Down Requirements.....	345
	Prioritization of requirements.....	345
	Levels of decomposition.....	346
	Seven steps of requirement building	346

Your Product Backlog	347
The dynamic to-do list	349
Product backlog refinement	349
Other possible backlog items	353
Product Backlog Common Practices.	354
User stories	354
Further refinement	357
CHAPTER 3: The Talent and the Timing	359
The Development Team	360
The uniqueness of scrum development teams.	360
Dedicated teams and cross-functionality	361
Self-organizing and self-managing	362
Co-locating or the nearest thing	364
Getting the Edge on Backlog Estimation	365
Your Definition of Done	365
Common Practices for Estimating.	367
Fibonacci numbers and story points	368
Velocity	374
CHAPTER 4: Release and Sprint Planning	377
Release Plan Basics: Stage 3	378
Prioritize, prioritize, prioritize	380
Release goals	382
Release sprints.	383
Release plan in practice	384
Sprinting to Your Goals.	386
Defining sprints	386
Planning sprint length.	387
Following the sprint life cycle.	388
Planning Your Sprints: Stage 4	389
Sprint goals.	389
Phase I.	390
Phase II	391
Your Sprint Backlog.	392
The burndown chart benefit	392
Setting backlog capacity	394
Working the sprint backlog	395
Prioritizing sprints	397
CHAPTER 5: Getting the Most Out of Sprints	399
The Daily Scrum: Stage 5	400
Defining the daily scrum.	400
Scheduling a daily scrum	402

Conducting a daily scrum	402
Making daily scrums more effective	403
The Team Task Board	404
Swarming	406
Dealing with rejection	407
Handling unfinished requirements	408
The Sprint Review: Stage 6	409
The sprint review process	410
Stakeholder feedback	411
Product increments	412
The Sprint Retrospective: Stage 7	412
The sprint retrospective process	413
The Derby and Larsen process	414
Inspection and adaptation	416
CHAPTER 6: Inspect and Adapt: How to Correct Your Course	417
The Need for Certainty	417
The Feedback Loop	418
Transparency	419
Antipatterns	421
External Forces	421
In-Flight Course Correction	422
Testing in the Feedback Loop	423
A Culture of Innovation	423
BOOK 6: THE NEXT LEVEL: ENTERPRISE AGILITY	425
CHAPTER 1: Taking It All In: The Big Picture	427
Defining Agile and Enterprise Agility	427
Understanding agile product delivery	428
Defining “enterprise agility”	431
Checking out popular enterprise agile frameworks	432
Practicing as much agile as your organization can tolerate	434
Achieving Enterprise Agility in Three Not-So-Easy Steps	435
Step 1: Review the top enterprise agile frameworks	435
Step 2: Identify your organization’s existing culture	436
Step 3: Create a strategy for making big changes	437
CHAPTER 2: Sizing Up Your Organization	443
Committing to Radical Change	444
Understanding What Culture Is and Why It’s So Difficult to Change	445
Figuring out why culture is so entrenched	445
Avoiding the common mistake of trying to make agile fit your organization	447

Identifying Your Organization's Culture Type	447
Running with the wolf pack in a control culture	450
Rising with your ability in a competence culture	452
Nurturing your interns in a cultivation culture	454
Working it out together in a collaboration culture	456
Laying the Groundwork for a Successful Transformation	458
Appreciating the value of an agile organization	459
Clarifying your vision	460
Planning for your transformation	461
CHAPTER 3: Driving Organizational Change	463
Choosing an Approach: Top-Down or Bottom-Up	464
Driving Change from Top to Bottom with the Kotter Approach	465
Step 1: Create a sense of urgency around a Big Opportunity	466
Step 2: Build and evolve a guiding coalition	467
Step 3: Form a change vision and strategic initiatives	468
Step 4: Enlist a volunteer army	469
Step 5: Enable action by removing barriers	470
Step 6: Generate (and celebrate) short-term wins	471
Step 7: Sustain acceleration	471
Step 8: Institute change	472
Improving your odds of success	472
Driving a Grassroots Change: A Fearless Approach	473
Recruiting a change evangelist	474
Changing without top-down authority	474
Making change a self-fulfilling prophecy	476
Looking for change patterns	476
Recruiting innovators and early adopters	477
Tailoring your message	477
Steering clear of change myths	478
Overcoming Obstacles Related to Your Organization's Culture	480
Seeing how culture can sink agile	480
Acknowledging the challenge	481
Prioritizing the challenge	482
Gaining insight into motivation	482
CHAPTER 4: Putting It All Together: Taking Steps toward an Agile Enterprise	485
Step 1: Identifying Your Organization's Culture	486
Step 2: Listing the Strengths and Challenges with Changing Your Culture	488
Step 3: Selecting the Best Approach to Organizational Change Management	491
Step 4: Training Managers on Lean Thinking	491

Step 5: Starting a Lean-Agile Center of Excellence (LACE)	493
Step 6: Choosing a High-Level Value Stream.	494
Step 7: Assigning a Budget to the Value Stream.	496
Step 8: Selecting an Enterprise Agile Framework	497
Step 9: Shifting from Detailed Plans to Epics.	499
Step 10: Respecting and Trusting Your People	500

BOOK 7: MAKING IT OFFICIAL: PMP CERTIFICATION 503

CHAPTER 1: Introducing the PMP Exam 505

Going Over the PMP Exam Blueprint	506
Knowledge and skills.	506
Code of ethics and professional conduct.	506
Exam scoring	507
Digging into the Exam Domains	507
Initiating the project	507
Planning the project	508
Executing the project	509
Monitoring and controlling the project	509
Closing the project.	509
Applying for and Scheduling the Exam	510
Surveying the application process	510
Scheduling your exam	512
Taking the Exam	512
Arriving on exam day	513
Looking at types of questions	514
Trying some exam-taking tips	516
Getting your results.	516
Preparing for the Exam	516

CHAPTER 2: It's All about the Process 519

Managing Your Project Is a Process	519
Understanding Project Management Process Groups	521
Before the Project Begins.	523
Initiating processes	523
Planning processes	525
Executing processes	529
Monitoring and Controlling processes.	531
Closing processes	532
The Ten Knowledge Areas	534
Project Integration Management	534
Project Scope Management.	535
Project Schedule Management	535
Project Cost Management	536

Project Quality Management	536
Project Resource Management	536
Project Communications Management	537
Project Risk Management	537
Project Procurement Management	538
Project Stakeholder Management	538
Mapping the Processes	539
CHAPTER 3: Reviewing the PMI Code of Ethics and Professional Conduct	541
Beginning with the Basics of the Code	542
Responsibility	543
Responsibility aspirational standards	543
Responsibility mandatory standards	544
Respect	545
Respect aspirational standards	545
Respect mandatory standards	546
Fairness	547
Fairness aspirational standards	547
Fairness mandatory standards	548
Honesty	549
Honesty aspirational standards	549
Honesty mandatory standards	550
Keeping Key Terms in Mind	551
INDEX	553

Introduction

No matter where you work or what you do, chances are you need to start, plan, execute, monitor, and complete projects smoothly. *Project Management All-in-One For Dummies* is your guide to effectively developing and using the skills you need.

About This Book

Project Management All-in-One For Dummies helps you acquire and cultivate some of the most important attributes needed for carrying out successful projects. Here, you get pointers on starting, planning, controlling, and finishing projects; using checklists and software to help you work; trying popular new project management methods like agile and scrum; and preparing for Project Management Professional (PMP) certification.

A quick note: Sidebars (shaded boxes of text) dig into the details of a given topic, but they aren't crucial to understanding it. Feel free to read them or skip them. You can pass over the text accompanied by the Technical Stuff icon, too. The text marked with this icon gives some interesting but nonessential information about increasing influence.

One last thing: Within this book, you may note that some web addresses break across two lines of text. If you're reading this book in print and want to visit one of these web pages, simply key in the web address exactly as it's noted in the text, pretending as though the line break doesn't exist. If you're reading this as an e-book, you've got it easy — just click the web address to be taken directly to the web page.

Foolish Assumptions

Here are some assumptions about you, dear reader, and why you're picking up this book:

- » You're an experienced project manager who wants to take your skills to new heights.
- » You're new to project management and you've never been on a project team, but you're eager to find out more.
- » You're interested in finding out about different tools you can use to manage projects.
- » You're curious about different types of project management methods, such as agile, scrum, and enterprise agility.
- » You want to brush up on some basics as you prepare for the PMP exam.

Icons Used in This Book

Like all *For Dummies* books, this book features icons to help you navigate the information. Here's what they mean.



REMEMBER

If you take away anything from this book, it should be the information marked with this icon.



TECHNICAL
STUFF

This icon flags information that digs a little deeper than usual into a particular topic.



TIP

This icon highlights especially helpful advice about developing and using project management skills.



WARNING

This icon points out situations and actions to avoid in your role as a project manager.

Beyond the Book

In addition to the material in the print or e-book you're reading right now, this product comes with some access-anywhere goodies on the web. Check out the free Cheat Sheet for info on the phases of a project life cycle, project management processes, and a project manager's basic tasks. To get this Cheat Sheet, simply go to www.dummies.com and search for "Project Management All-in-One For Dummies Cheat Sheet" in the Search box.

Where to Go from Here

You don't have to read this book from cover to cover, but if you're an especially thorough person (and you probably are if you're a project manager!), go right ahead. If you just want to find specific information and then get back to your projects, take a look at the table of contents or the index, and then dive into the chapter or section that interests you.

For example, if you want the basics on starting, planning, and managing a project, flip to Books 1 and 2. If you want to build your scrum skills, check out Book 5. Or if you're considering earning your PMP certification, Book 7 is the place to be.

No matter where you start, you'll find the information you need to more effectively manage your work projects. Good luck!

1

In the Beginning: Project Management Basics

Contents at a Glance

CHAPTER 1: Achieving Results with Project Management	7
Determining What Makes a Project a Project	7
Defining Project Management.	12
Knowing the Project Manager's Role	17
CHAPTER 2: Involving the Right People	23
Understanding Your Project's Stakeholders	24
Developing a Stakeholder Register	24
Determining Whether Stakeholders Are Drivers, Supporters, or Observers.	31
Displaying Your Stakeholder Register	38
Confirming Your Stakeholders' Authority	39
Assessing Your Stakeholders' Power and Interest	40
CHAPTER 3: Developing Your Game Plan	43
Divide and Conquer: Breaking Your Project into Manageable Chunks	43
Creating and Displaying Your Work Breakdown Structure	57
Identifying Risks While Detailing Your Work	68
Documenting What You Need to Know about Your Planned Project Work	70

- » Defining a project and its four phases
- » Breaking down project management
- » Identifying the project manager's role

Chapter **1**

Achieving Results with Project Management

Successful organizations create projects that produce desired results in established time frames with assigned resources. As a result, businesses are increasingly driven to find individuals who can excel in this project-oriented environment.

Because you're reading this book, chances are good that you've been asked to manage a project. So, hang on tight — you're going to need a new set of skills and techniques to steer that project to successful completion. But not to worry! This chapter gets you off to a smooth start by showing you what projects and project management really are and by helping you separate projects from non-project assignments. This chapter also offers the rationale for why projects succeed or fail and gets you into the project-management mindset.

Determining What Makes a Project a Project

No matter what your job is, you handle a myriad of assignments every day. For example, you may prepare a memo, hold a meeting, design a sales campaign, or move to new offices. Or you may make the information systems more

user-friendly, develop a research compound in the laboratory, or improve the organization's public image. Not all these assignments are projects. How can you tell which ones are and which ones aren't? This section is here to help.



TIP

People often confuse the following two terms with *project*:

- » **Process:** A *process* is a series of routine steps to perform a particular function, such as a procurement process or a budget process. A process isn't a one-time activity that achieves a specific result; instead, it defines *how* a particular function is to be done every time. Processes, like the activities that go into buying materials, are often parts of projects.
- » **Program:** This term can describe two different situations:
 - First, a *program* can be a set of goals that gives rise to specific projects, but, unlike a project, a program can never be completely accomplished. For example, a health-awareness program can never completely achieve its goal (the public will never be totally aware of all health issues as a result of a health-awareness program), but one or more projects may accomplish specific results related to the program's goal (such as a workshop on minimizing the risk of heart disease).
 - Second, a *program* sometimes refers to a group of specified projects that achieve a common goal.

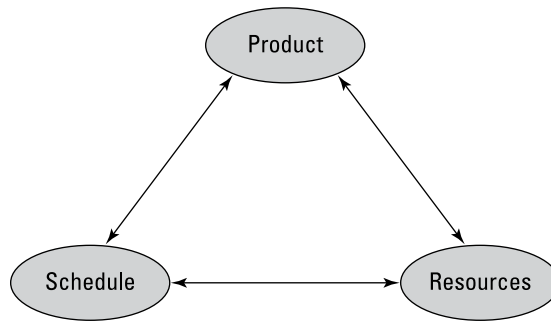
Understanding the three main components that define a project

A *project* is a temporary undertaking performed to produce a unique product, service, or result. Large or small, a project always has the following three components:

- » **Specific scope:** Desired results or products.
- » **Schedule:** Established dates when project work starts and ends. (See Chapter 1 in Book 2 for how to develop responsive and feasible project schedules.)
- » **Required resources:** Necessary number of people and funds and other resources.

As illustrated in Figure 1-1, each component affects the other two. For example: Expanding the type and characteristics of desired outcomes may require more time (a later end date) or more resources. Moving up the end date may necessitate paring down the results or increasing project expenditures (for instance, by paying overtime to project staff). Within this three-part project definition, you perform work to achieve your desired results.

FIGURE 1-1:
The relationship between the three main components of a project.



© John Wiley & Sons, Inc.



REMEMBER

Although many other considerations may affect a project's performance (see the later section "Defining Project Management" for details), these three components are the basis of a project's definition for the following three reasons:

- » The only reason a project exists is to produce the results specified in its scope.
- » The project's end date is an essential part of defining what constitutes successful performance; the desired result must be provided by a certain time to meet its intended need.
- » The availability of resources shapes the nature of the products the project can produce.

A Guide to the Project Management Body of Knowledge, 6th Edition (PMBOK 6), elaborates on these components by

- » Emphasizing that *product* includes both the basic nature of what is to be produced (for example, a new training program or a new prescription drug) and its required characteristics (for example, the topics that the training program must address), which are defined as the product's *quality*
- » Noting that *resources* refers to funds, as well as to other, nonmonetary resources, such as people, equipment, raw materials, and facilities

PMBOK 6 also emphasizes that *risk* (the likelihood that not everything will go exactly according to plan) plays an important role in defining a project and that guiding a project to success involves continually managing tradeoffs among the three main project components — the products to be produced and their characteristics, the schedule, and the resources required to do the project work.

Recognizing the diversity of projects

Projects come in a wide assortment of shapes and sizes. For example, projects can

» Be large or small

- Installing a new subway system, which may cost more than \$1 billion and take 10 to 15 years to complete, is a project.
- Preparing an ad hoc report of monthly sales figures, which may take you one day to complete, is also a project.

» Involve many people or just you

- Training all 10,000 of your organization's staff in a new affirmative-action policy is a project.
- Rearranging the furniture and equipment in your office is also a project.

» Be defined by a legal contract or by an informal agreement

- A signed contract between you and a customer that requires you to build a house defines a project.
- An informal promise you make to install a new software package on your colleague's computer also defines a project.

» Be business-related or personal

- Conducting your organization's annual blood drive is a project.
- Having a dinner party for 15 people is also a project.



REMEMBER

No matter what the individual characteristics of your project are, you define it by the same three components described in the previous section: results (or scope), start and end dates, and resources. The information you need to plan and manage your project is the same for any project you manage, although the ease and the time to develop it may differ. The more thoroughly you plan and manage your projects, the more likely you are to succeed.

Describing the four phases of a project life cycle



REMEMBER

A project's *life cycle* is the series of phases that the project passes through as it goes from its start to its completion. A *phase* is a collection of logically related project activities that culminates in the completion of one or more project deliverables (see Chapter 3 in Book 1 for more on project deliverables). Every project, whether large or small, passes through the following four life-cycle phases:

- » **Starting the project:** This phase involves generating, evaluating, and framing the business need for the project and the general approach to performing it and agreeing to prepare a detailed project plan. Outputs from this phase may include approval to proceed to the next phase, documentation of the need for the project and rough estimates of time and resources to perform it (often included in a project charter), and an initial list of people who may be interested in, involved with, or affected by the project.
- » **Organizing and preparing:** This phase involves developing a plan that specifies the desired results; the work to do; the time, cost, and other resources required; and a plan for how to address key project risks. Outputs from this phase may include a project plan that documents the intended project results and the time, resources, and supporting processes needed to create them.
- » **Carrying out the work:** This phase involves establishing the project team and the project support systems, performing the planned work, and monitoring and controlling performance to ensure adherence to the current plan. Outputs from this phase may include project results, project progress reports, and other communications.
- » **Closing the project:** This phase involves assessing the project results, obtaining customer approvals, transitioning project team members to new assignments, closing financial accounts, and conducting a post-project evaluation. Outputs from this phase may include final, accepted, and approved project results and recommendations and suggestions for applying lessons learned from this project to similar efforts in the future.

For small projects, this entire life cycle can take just a few days. For larger projects, it can take many years! In fact, to allow for greater focus on key aspects and to make it easier to monitor and control the work, project managers often subdivide larger projects into separate phases, each of which is treated as a mini-project and passes through these four life-cycle phases. No matter how simple or complex the project is, however, these four phases are the same.



REMEMBER

In a perfect world, you complete one phase of your project's life cycle before you move on to the next one, and after you complete that phase, you never return to it again. But the world isn't perfect, and project success often requires a flexible approach that responds to real situations that you may face, such as the following:

- » **You may have to work on two (or more) project phases at the same time to meet tight deadlines.** Working on the next phase before you complete the current one increases the risk that you may have to redo tasks, which may cause you to miss deadlines and spend more resources than you originally planned. If you choose this strategy, be sure people understand the potential risks and costs associated with it.

- » **Sometimes you learn by doing.** Despite doing your best to assess feasibility and develop detailed plans, you may realize you can't achieve what you thought you could. When this situation happens, you need to return to the earlier project phases and rethink them in light of the new information you've acquired.
- » **Sometimes things change unexpectedly.** Your initial feasibility and benefits assessments are sound, and your plan is detailed and realistic. However, certain key project team members leave the organization without warning during the project. Or a new technology emerges, and it's more appropriate to use than the one in your original plans. Because ignoring these occurrences may seriously jeopardize your project's success, you need to return to the earlier project phases and rethink them in light of these new realities.

Defining Project Management

Project management is the process of guiding a project from its beginning through its performance to its closure. Project management includes five sets of processes, which is described in more detail in the following sections:

- » **Initiating processes:** Clarifying the business need, defining high-level expectations and resource budgets, and beginning to identify audiences that may play a role in your project
- » **Planning processes:** Detailing the project scope, time frames, resources, and risks, as well as intended approaches to project communications, quality, and management of external purchases of goods and services
- » **Executing processes:** Establishing and managing the project team, communicating with and managing project audiences, and implementing the project plans
- » **Monitoring and controlling processes:** Tracking performance and taking actions necessary to help ensure project plans are successfully implemented and the desired results are achieved
- » **Closing processes:** Ending all project activity

As illustrated in Figure 1-2, these five process groups help support the project through the four phases of its life cycle. Initiating processes support the work to be done when starting the project, and planning processes support the organizing and preparing phase. Executing processes guide the project tasks performed when carrying out the work, and closing processes are used to perform the tasks that bring the project to an end.